



China Electronic Transformer and Inductor Industry Report, 2012

Oct. 2012

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include the China Electronic Component Association, National Bureau of Statistics of China and China Customs etc.

Abstract

Electronic transformer and inductor are two major electromagnetic elements. And the major function of the former is to convert AC power into AC voltage and current, while the major function of the latter is to convert electric energy into magnetic energy and then to store the magnetic energy. The two have common places when it comes to the product structure, being largely applied in fields like computer, UPS, automotive electronics, consumer electronics, new energy and network communication.

In the world, major enterprises specializing in the production of magnetic elements like electronic transformer and inductor include Japan-based TDK, Taiyo Yuden, Murata, America-based Pulse, Germany-based EPCOS, Israel-based Payton and Taiwan-based Delta Electronics, all of which take a leading position in mid-and high-end electronic transformer and inductor market.

With increasing demand and the transfer of production bases of global manufacturers, Chinese mainland has become one of the major electronic transformer and inductor producers in the world, with the respective output of electronic transformers and inductors in 2011 grossing 12.784 billion units and 53.783 billion units. The estimation shows that the output and sales volume of electronic transformers in mainland China will grow by around 10% on average during 2012-2015, while that of the inductors, the demand for which is driven by the demand for smartphone, will grow by around 12% on average in the upcoming years.

Leading domestic manufacturers include Guangdong Fenghua Advanced Technology (Holding), Shenzhen Sunlord Electronics, Shenzhen Click technology, Shenzhen Microgate Technology, Datronix Holdings Limited, etc.

Major Electronic Transformer and Inductor Manufactures in China

Manufacturer	Major Product	Revenue in 2011 (RMB mln)
Guangdong Fenghua Advanced Technology (Holding)	Inductor, filter, transformer and other magnetic elements	2,082
DongGuan DaZhong Electronic	Electronic transformer, inductor, etc.	701
Shenzhen Jingquanhua Electronics	Power transformer, power-supply filter, inductor, etc.	697
Shenzhen Click Technology	Electronic transformer, inductor, switching power supply, etc	638
Shenzhen Sunlord Electronics	Inductor, transformer and other electronic components	550
Shenzhen Highlight Electronic	Electronic transformer, inductance coil	410
Shenzhen Meikai Electronics Stock	Switching mode power supply transformer, inductor, etc.	252
Datronix Holdings Limited	Electronic transformer, filter, other magnetic elements	263 (HKD mln)
Shenzhen FuZhenhua Electronics	Inductor, capacitor, etc.	154
Shenzhen Microgate Technology	Chip inductor, filter, resistor, etc.	131

Source: ResearchInChina <China Electronic Transformer and Inductor Industry Report, 2012>

Shenzhen Sunlord Electronics is China's largest inductor manufacturer, specializing in the production of chip electronic components, with the proportion of chip inductor accounting for around 90%. The inductors made by the company are largely applied in smartphones, which contribute roughly 50% revenue. Shenzhen Sunlord Electronics is a major high-frequency inductor supplier of domestic mobile phone producers including Lenovo, ZTE, Huawei and Coolpad.

As an electronic transformer producer, Shenzhen Click Technology has strong competitive production capability. With more than one hundred magnetic element production lines and dozens of power supply products manufacturing and production lines, the company has realized the capacity of more than 150 million magnetic devices and 8 million power supply products. Switching mode power supply transformer, the hit product of the company, accounts for more than 30% of the company's total sales, while inductor accounts for over 20%.

The Report highlights:

- Related policies and technologies of China's electronic transformer and inductor industry;]
- Output & sales volume, market structure, import & export, market competition, development outlook of electronic transformer and inductor in China;
- Supply and price fluctuation in upstream raw material market; development and prospect of downstream demand market;
- Prediction of output & sales volume of electronic transformers and inductors and development outlook of downstream market based on current status of market development;
- Major products, financial status, product development, strategic adjustment, business performance of leading foreign and domestic manufacturers.

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